

Deliverable review and approval workflows

Automates the review and approval process for client deliverables, routing work through appropriate stakeholders and tracking approval status to ensure quality control and timely delivery.

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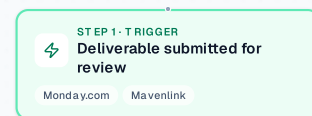


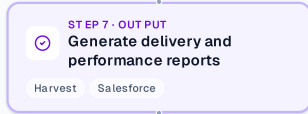
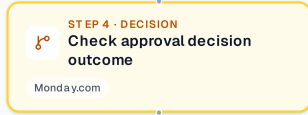
WORKFLOW TRIGGER

Project deliverable is marked as ready for review in project management system

Visual Flow

Each node represents an automated step. Connections show how data and decisions move through the workflow.





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Step-by-Step Breakdown

Detailed explanation of each automated stage in the workflow.

1

⚡ TRIGGER

Deliverable submitted for review

A team member marks a deliverable as complete and ready for review in the project management system. This triggers the automated approval workflow.

2

 ACTION

Assign reviewers based on project

System automatically identifies and assigns appropriate reviewers based on project type, client tier, and deliverable category. Notification emails are sent to assigned reviewers.

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3

 ACTION

Track review completion status

Monitor reviewer progress and send automated reminders if reviews are not completed within the defined SLA timeframe. Log all review activities for audit trail.

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4

 DECISION

Check approval decision outcome

Evaluate whether all required reviewers have approved the deliverable or if changes are requested. Branch workflow based on approval status.

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5

 ACTION

Route approved deliverable to client

For approved deliverables, update client portal access, send delivery notification, and log billable time. Update project status in CRM system.

6

 ACTION

Handle revision requests efficiently

For deliverables requiring changes, compile reviewer feedback, reassign to original creator, and reset approval workflow. Track revision cycles for project metrics.

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Mavenlink

7

 OUT PUT

Generate delivery and performance reports

Produce automated reports showing deliverable approval rates, review cycle times, and client satisfaction metrics. Update project profitability tracking.

Harvest

Salesforce



Outputs

- Client deliverable approved and delivered
- Revision feedback compiled and reassigned
- Approval workflow performance report

- Updated project timeline and billing records

AI Business OS



Key Metrics

- Average approval cycle time
- First-pass approval rate
- Client delivery SLA compliance



Tools & Integrations

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